

Bell Atlantic — Request for Proposals: Massachusetts Dual Party Relay Service

Interpreter/Transliterators workstations. This Bidder will provide training to all VRI personnel on the operation of a Telecommunication Relay Service / Video Relay Service ("TRS/VRS") combination workstation. They will be responsible for maintaining network integrity between the two VRS Centers and 6 VRS (BRI-ISDN) "or better" user sites. Toll free access to VRS Centers shall be provided by the Bidder to privately equipped ISDN customers. The VRS provider will generate statistical reports using a format similar to current DPRS reports.

Two VRS Center work sites for the VRS operators will be established by the Bidder. VRS calls from any part of the Commonwealth may be routed to either VRS center in consideration of load balancing. Each center will have three video relay interpreter/transliterators workstations - two for VRI interpreter/transliterators and one for the VRI Center Supervisor.

Computers shall be Pentium™ "or 586 or better" with state-of-the-art video capability able to achieve and maintain 30+ frames per second.

B. Locations

The Bidder shall purchase/lease BRI-ISDN service and video conferencing equipment and computers that will be installed at 5 locations throughout the Commonwealth. Existing sites employed by the Commonwealth currently for video conferencing that meet the standards described above may qualify as VRS remote sites. The five public sites may include schools or programs for the people who are deaf, hard-of-hearing, late-deafened, or deafblind. Other sites selected will represent a variety of community locations accessible to trial participants (particular attention should be paid to the lease or rental of existing installations). Equipment purchased or leased will include specially configured software to allow users an easy and intuitive interface with the computer for making a VRS call.

C. Oversight

A VRS Manager will be hired by the Bidder's Project Manager to assist overseeing the operation of the VRS system. The VRS Manager will purchase and set up equipment, train the community agency staff at the 5 locations on its use, and provide on-going support. The VRS Manager must also conduct outreach, assist consumers in using VRS, and conduct consumer surveys. Definition and distinction between the duties for the VRS Manager and Administrator's Project Manager will need to be reviewed by the Administrator prior to contracting for this position and service.

D. Hours of Operation

The video relay service will be made available during off-hours for demonstrations to community groups, planned events, and the media. A videotape will be produced explaining the use and function of the video relay service. Consumers will

also be invited to make 'video calls' to each other (at consumer expense) using the Bidder's equipment at the 5 community-based installations.

E. Service Extension

*Funding requested for the project includes additional expenses for service extension (not expansion until viability has been determined) to include a full calendar year. A separate recommendation for an on-going provisional service will be made to the Administrator after data collected from the initial trial period is reviewed. The Administrator retains the option of extending the contract should provisional service be approved and implemented at a later date. Please also see the **Glossary of Terms**.*

In a separate bid, the Bidder shall describe in detail the service, physical plant, components, human resources, how intrastate calls vs. interstate calls would be identified for billing, etc., that shall be provided for the provision of Video Relay Service in Massachusetts.

3.3.12 Transfer Capability

Value-Added. The Bidder must detail how the Relay Center will be equipped to allow for the transfer of calls within the relay center when necessary to meet user needs. By transfer, it is meant that originating calls, either voice or text, may be switched to a supervisor, another operator of a different gender, non-English speaking operator, etc., or another relay center within the state. This requires switching the originating call from one console position to another within the Relay Center and/or the capability of switching the originating call to a similar facility located elsewhere within the Commonwealth.

The Bidder must explain in detail the plan to meet this specification.

3.3.13 Intrastate Long Distance and Toll Call Billing

Must Provide. Intrastate long distance and toll calls placed through the Relay Center shall be billed at the same rate that would apply if the calls had been placed without the use of the relay operator. This rate shall include any applicable discounts offered to DPRS users by the user's long distance carrier or by the local exchange company for a toll call and an individual's local calling plan.

The Bidder must explain in detail the plan to meet this specification.

3.3.14 Description of Interstate/InterLATA Calling Procedures

Must Provide. The Bidder shall detail how interstate and international calls will be provided through the proposed relay service. The discussion will include details describing how all interstate costs involved (i.e., operator time, facility and equipment

usage, overhead, billing and administrative costs, etc.) will be completely separate from intrastate costs. The Bidder will estimate numbers of additional staff, operator positions, and other equipment that will be required to relay interstate calls.

The Bidder shall provide the materials/documentation indicated in the description above.

3.3.15 Coin-operated Payphones

Must Provide. The DPRS provider selected will be required to meet the FCC mandated process for calls through the relay center placed from a coin station.

The Bidder shall provide the materials/documentation indicated in the description above.

3.3.16 DPRS Computer Setup for a Text Based Telephone Equipment Originating Call

3.3.16.1 Database

Must Provide. The Relay Center must create a database (See Section 3.2.7 which describes the database) that correlates user's telephone number(s) and Personal Identification Number(s) ("PIN") to a relay user's preference for relay service (e.g., VCO, HCO, Verbatim or Transliterated, male/female and other preferences).

The Bidder shall describe in detail the plan to meet this specification.

3.3.16.2 ANI Call Setup

Value-Added. The Relay Center must utilize ANI (Automatic Number Identification) to identify the incoming text based telephone device telephone numbers and automatically retrieve the database preference information corresponding to the default PIN number to facilitate relay setup. Should the ANI have multiple profiles (multiple PIN numbers), it is the duty of the caller to request another profile besides the default. In the event that the user is uncertain, he or she may request that the current settings be transmitted to the user in a format that is clear and understandable. The call will proceed with the pre-specified preferences unless the user indicated the need to clarify or change the preferences. If the user has not previously established preferences, or if the user wishes to override the current preferences, the OPR will assist in manually configuring the preferences for the relay call.

The Bidder must detail how he would comply with this specification.

3.3.16.3 Wait Time Estimates

Must Provide. All relay calls shall be answered by an OPR ready to place the call (See Sections 3.2.13 and 3.3.1). If the DPRS provider is in noncompliance and a user must wait in the queue for the next available OPR, the relay service must provide

an estimate of the wait time in voice, Baudot and/or ASCII format if the wait time is more than 10 seconds. The wait time estimate can be based on relay traffic at the time of the call.

The Bidder must describe in detail the plan to meet this specification.

3.3.17 Text-to-Voice Capability

Value-Added. The Bidder must specify if a text-to-voice capability will be available and how it would meet this specification. If available, a user could request this service to translate what is typed by the text based telephone device user into a synthesized voice for the hearing person to hear. The software must be robust under imprecise spelling inputs and phonetic English inputs. The user must be able to choose between a male and a female synthesized voice.

The Bidder shall describe in detail the plan to meet this specification.

3.3.18 Two-way (Single-Line) VCO

Value-Added. A two-way single-line VCO will be available for those users who wish to use it. A two-way VCO capability allows two users to simultaneously use the VCO feature. The OPR transcribes and transmits the voice of both users so that neither user has to type. The Bidder shall describe the technology he will use to provide the service, any attendant OPR training necessary, and the training program.

The Bidder shall describe in detail the plan to meet this specification.

3.4 Operational Specifications and Protocols

3.4.1 Confidentiality of Calls

Mandatory. Consistent with the obligations of common carrier operators, all

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calls shall be confidential and shall remain totally confidential, and therefore no written, audio, or electronic script shall be kept beyond the duration of the call with the exception of an intended, identical message for multiple answering machines (See Section 3.4.9.16.2.1). OPRs and supervisory personnel shall not reveal information about any call, except the minimum necessary for billing purposes, including the information described below.

OPRs and supervisory personnel must be required to sign a pledge of confidentiality promising not to disclose the identity of any callers or fellow relay OPRs or supervisory personnel or any information learned during the course of relaying calls, either during the period of employment as an operator or after termination of employment.

The Bidder shall describe in detail the plan to meet this and the following specifications.

a. OPRs and supervisory personnel shall not reveal any of the following information:

- i. Names, genders, or ages of the parties of the call;
- ii. Originating or terminating points of the call; or
- iii. Specifics of the information conveyed.

b. OPRs and supervisory personnel shall not discuss, even among themselves or with their supervisors, any names or specifics of any relay call, except as required in the course of resolving complaints. OPRs may discuss the general situation that they need assistance with in order to clarify how to process a particular type of relay call.

OPRs and supervisory personnel should be trained to ask questions about procedures without revealing names or specific information that will identify the caller. If a user is in an emergency or life-threatening situation or causes an emergency situation to exist by threatening the OPR, supervisory personnel or the Relay Center, names and specific information may be disclosed by the OPR and supervisory personnel to a supervisor to help in addressing the situation expeditiously.

If an OPR or supervisory personnel wishes — or needs — to report any potential non-compliance or perceived gross negligence on the part of the DPRS provider, they may do so while still withholding names of consumers and critical information by contacting the Administrator.

c. Watching or listening to actual calls by anyone other than the relay OPR is prohibited, except for training or monitoring purposes.

d. Proposals shall outline the policies the Bidder will use to preserve confidentiality. Specific policies shall be developed after contract award and must be in place at start-up time, or by the time of first hire. Such policies may include protocols employees are encouraged to use to prevent unintentional disclosure of relayed conversations. A copy of the Confidentiality Policy shall be provided to

a user upon request.

e. An OPR or supervisory personnel who, after investigation, is found to have violated the confidentiality rules and regulations shall either be terminated immediately or be given a warning and automatically terminated if the breach occurs a second time. Proposals shall specify the policy for reviewing alleged violations of confidentiality.

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f. The contractor shall be restricted to collecting only that personal information necessary to provide and bill for the relay service being rendered. This information shall not be used for any other purpose, with the exception where this information is necessary under standard operating practices for responding to customer complaints, or to cooperate with legitimate governmental investigations.

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3.4.2 Emergency Calls

Preamble. The Commonwealth of Massachusetts employs Enhanced 911 service that provides caller location as well as provides the caller with the ability to use voice, TTY or to signal their need silently through the touch-tone phone keypad when accessing emergency telecommunications services (911). Although E911 is 100% accessible, some callers will panic or are not yet aware of E911's ability and will call the DPRS².

Mandatory. The DPRS shall have satisfactory procedures for receiving, transmitting, and tracking³ emergency calls. OPRs shall be trained to handle such calls. A plan for handling emergency calls must be submitted as part of each proposal.

The Bidder must describe in detail the plan to meet this specification.

3.4.3 Pre-Subscription Utilization (Carrier of Choice)

Mandatory. Bidders shall describe the method they will provide for users of the DPRS to select their inter-exchange carrier automatically. The Bidder shall provide an entry in the consumer preference database for this purpose and must list the choices of long distance carriers that will be offered

The Bidders shall describe in detail the plan to meet this specification.

3.4.4 Multi-lingual Relay Service

Must Provide. The Bidder shall provide the plan for providing non-English language relay calls. This includes "same language" text to speech relay as well as translation from a verbal, non-English language to English text. Desirable languages

² For further details on E911 in Massachusetts, contact Robert Watkinson, Director, Statewide Emergency Telecommunications Board, PO Box 156, Reading, MA 01867 (781) 944 9113 (Voice/TTY).

³ For the purpose of this RFP, "tracking" means being able to supply the appropriate emergency response service with the caller's number to take advantage of E911's database that connects ANI with the address of the caller.

are: Spanish, Vietnamese, Portuguese, Russian and Khmer.

The Bidder must describe in detail the plan to meet this specification.

3.4.4.1 Multi-lingual Translation AND Relay Calls

Preamble. Many potential relay users who are deaf or hard of hearing — and who have received their education in programs and through services in the United States and other locations — have families whose primary language is not English. These individuals and their families typically employ ASL or gestures as a visual means to communicate but are unable to communicate via telephone without translation between non-native, typed English and another language. In an effort to address this issue, as well as verbal to typed, same language relay, the Bidder will provide the following:

Value-Added. The Bidder must explain in detail the plan to provide multi-lingual capabilities for enabling non-English-speaking DPRS users to communicate with text based telephone device users whose means of printed language expression is non-native English (or ESL) and describe the methodology for determining when any additional foreign language capabilities will be added. Desirable languages are: Spanish, Vietnamese, Portuguese, Russian and Khmer.

The Bidder must describe in detail the plan to meet this specification.

3.4.5 Relay Operator (OPR) Choice

Must Provide. The text based telephone device user may choose either a male or female OPR. The DPRS provider is required to have an adequate number of both male and female staff available to honor the request for either a male or female OPR. OPR changes during relay call processing shall remain consistent with the previous OPR (male or female).

The Bidder shall describe in detail the plan to meet this specification.

3.4.6 Operator Services

Value-Added. The Bidder must detail how it will provide text-based standard operator services at no cost except for any charges for services which normally are billed directly to the caller as applicable. This service will provide all of the standard

operator services normally provided to all telephone users, including directory assistance, but will be available to callers using DPRS. (See Section 3.3.8.3).

The Bidder shall describe in detail the plan to meet this specification.

3.4.7 Work Space

Value-Added. The Bidder shall describe its design for a Relay Operator's work area that is well lit and constructed to prevent high noise interference with the performance of OPR duties and does not permit OPRs at adjacent stations to be overheard by the callers.

The Bidder shall describe in detail the plan to meet this specification.

3.4.8 Minimum OPR Qualifications

Value-Added. Bidders shall specify how they plan to demonstrate that Operator meet all necessary proficiency requirements. Operators shall be able to quickly and accurately type text relay messages and speak in a clear, concise, understandable manner to the voice users. This shall include, but not be limited to, the following capabilities:

3.4.8.1 English Skills, Basic Skills, English Grammar

Mandatory. Basic skills in English grammar, as demonstrated by a continued grammar test measuring both auditory and visual typing, are required. The maximum combined typographical and grammatical error rate allowed shall be ~~ten percent (10%)~~. ??

The Bidder shall describe in detail the plan to meet this specification.

3.4.8.2 Typing Speed and Accuracy

Value-Added. A minimum typing speed of fifty-five (55) words per minute ("wpm") with a two percent or less error rate at entry level; a minimum speed of sixty (60) wpm with a two percent or less error rate upon completion of initial training and sixty-five (65) wpm with a two percent or less error rate after 90 days, is required. A typing test shall be administered upon entry, completion of initial training, and after 90 days to measure both auditory and visual typing capabilities. The formula to calibrate words per minute, shall be five (5) keystrokes (four alphanumeric characters plus one space) per "word" requiring three hundred and twenty-five (325) keystrokes per minute to achieve sixty-five (65) wpm. ~~Macros that are executed by one function key shall count as one keystroke regardless of the number of alphanumeric characters "attached" to that macro. Similarly, a macro executed with two key strokes shall count for two keystrokes regardless of the number of alphanumeric characters "attached" to that macro.~~ Prior to the filing of the Service Agreement with DTE, the successful Bidder shall supply to the Administrator a complete, detailed listing of all macros employed or planned to be employed.

The Bidder shall describe in detail the plan to meet this specification.

3.4.8.3 Spelling Skills

Value-Added. Minimum spelling skills equivalent to quickly and easily spelling *words comparable to a mature, college-level conversation are required. The Bidder* must describe how spelling skills will be measured upon entry and on an on-going basis.

The Bidder shall describe in detail the plan to meet this specification.

3.4.8.4 Transliteration/Translation of Non-Native English

Value-Added. An ability to understand deaf, hard of hearing, and deafblind people using non-native English (or ESL) and to transliterate/translate it to correct written English is required. The Bidder shall demonstrate how he plans to train Operators to transliterate/translate such calls and how they will determine the need. Furthermore, the Bidder shall indicate at what level he would consider Operators to be fully trained in this capacity.

The Bidder will provide an entry in the consumer profile database (See Section 3.2.7) addressing this issue and the default shall be to transliterate/translate as needed. The other option shall be: word-for-word.

The Bidder shall describe in detail the plan to meet this specification.

3.4.8.5 Relay Operator Proficiency Exam

Must Provide. The contractor providing DPRS shall require that all prospective Operators take a quantifiable, performance-based relay Operator proficiency exam at time of hiring and pass the quantifiable, performance-based relay Operator proficiency examination at the completion of the 90 day training period as well as take a similar exam annually. This examination shall cover spelling, typing, dictation, interpretation of typewritten ASL, and procedures, including the handling of emergency calls, ~~characteristics of ASL as it may be reflected in the written language of text based telephone device users,~~ familiarity with deaf culture, ethics and confidentiality, and professional judgment. This test shall have — as its minimum requirements — the proficiency skills for Operators mandated by this RFP. The Relay Center shall make sure that material from these tests is not available to the Operators before testing time and must change portions of the tests from time to time. The Bidder must include a copy of the expected proficiency examination in the proposal. Any Operator who cannot pass this examination within a three-month training period shall not be utilized as a relay operator. Operators shall be re-tested at least once a year.

The Bidder shall describe in detail the plan to meet this specification.

3.4.9 Procedures for Relaying Communication

Preamble. Operators must simultaneously convey the full content, context and intent of the communication they transliterate. The key word is intent. Unless requested otherwise by a user, the Operator shall relay all calls according to the procedures *described below*.

The Bidder shall describe how the following specifications will be met:

3.4.9.1 Call Status

Must Provide. Operators shall also keep the user informed on the status of the call, such as dialing, ringing, busy, disconnected, on hold, etc.

The Bidder shall describe in detail the plan to meet this specification.

3.4.9.1.1 Ringing

Value-Added. The Bidder shall provide a detailed description of the procedure and protocol to satisfy the requirement that all ringing status shall be indicated by "RINGING 1... 2... 3..." up to ten (10) rings then turn control over to the caller. The Bidder shall supply with this proposal scripts, or macro scripts — if any — that are employed for the Operator to keep the caller informed of how many rings prior to connection or user's abandonment of the call.

The Bidder shall describe in detail the plan to meet this specification.

3.4.9.2 User Control

Value-Added. The user shall have the option of telling the Operator what aspects of the call that he/she will handle. For example, the user may request that he/she introduce relay services to the called party, rather than have the Operator do it. The Bidder will provide an entry in the customer profile database addressing this and other "user control" issues.

The Bidder shall describe in detail the plan to meet this specification.

3.4.9.3 Typing Verbatim

Must Provide. The Operator shall type to the text based telephone device user or verbalize to the voice user exactly what is said when the call is first answered and at all times during the conversation unless either party specifically requests otherwise.

The Bidder shall provide an entry in the customer profile database addressing this issue and the default shall be to transliterate/translate as needed. The other option shall be: verbatim (word-for-word).

The Bidder shall describe in detail the plan to meet this specification.

3.4.9.3.1 Transliteration/Translation of Non-Native Written/Typed English

Must Provide. Those users whose native language is not English will need to *have their calls transliterated / translated into clear, spoken English so that the voice user can understand the call and communication occurs. The voice user's spoken English must be translated back into typed English to match the style of the text based telephone device user and clear communication occurs.* Text based telephone device users may instruct the Operator to voice in standard English or read word-for-word that which the text user types.

The Bidder will provide an entry in the customer profile database addressing this issue and the default shall be to transliterate/translate as needed. The other option shall be verbatim (or word-for-word).

The Bidder shall describe in detail the plan to meet this specification.

3.4.9.4 Explaining Relay

Must Provide. When the Operator needs to explain relay to a voice user, the Operator shall also type "explaining relay GA" for the benefit of the text based telephone device user. To prevent lengthy pauses at the beginning of the call, the text user may type in a greeting while the Operator explains relay to the voice user. Upon request by the user, the Operator shall not announce a call as a relay call, permitting the caller to provide explanation, if any. If the caller uses a text based telephone device, the Operator shall have the option to inform the called party that the caller uses a text telephone unless the caller asks the Operator not to do so. In the event that the caller is a voice user, the Operator shall have the option to inform the called party that the call is a voice call unless the caller asks the Operator not to do so. The Bidder shall include standard "explaining relay" scripts typically used for voice users with the bid.

The Bidder shall provide an entry in the consumer profile database addressing this issue and the default shall be for the Operator to explain relay unless requested not to do so by the user in advance. The option shall be not to automatically explain relay but to allow the user complete control over this aspect of a call. The user who selects this option may explain it himself or herself or request that the Operator do so in advance.

The Bidder shall describe in detail the plan to meet this specification.

3.4.9.5 Communicating Tone and Background Noise

3.4.9.5.1 Conversational Tone

3.4.9.5.1.1 Voicing for the Text Telephone User

Must Provide. When speaking for the text based telephone device user, the Operator shall adopt a conversational tone of voice appropriate to:

- the type of call being made;
- the context, content and intent of the call; and
- the text telephone device user's use of punctuation, figures of speech, etc.

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The Bidder shall describe in detail the plan to meet this specification.

3.4.9.5.1.2 Typing for the Voice User

Must Provide. Operators shall, to the best of their abilities, let the text telephone device user know the voice user's tone of voice if it has any bearing on the content, context, or intent of the conversation by describing the tone used in a text based format. The intent of this requirement is to convey tone of voice that is out of the ordinary or has a substantial impact on the content, context, or intent of the call and is not apparent through the textual content. Nevertheless, a user shall have the option of requesting all conversational tone or no conversational tone.

Phrases or words such as "sounds like" or "sounds" shall not be used unless requested. The Operator shall not provide opinion but shall provide observation of the situation. Examples of conversational tone include but are not limited to: (ABRUPT), (YELLING), (TALKING FAST), (MUMBLING), (CRYING). Such descriptions of the observation of tone of voice may be used when it is not already apparent from the textual content, context or intent of the call. Consumer input has also indicated that — regardless of the user profile — should conversational tone of voice seem out of the ordinary or change suddenly or markedly, this should be conveyed in the manner and style indicated by the examples above.

The Bidder will provide an entry that can contain at least three choices in the consumer profile database addressing this issue and the default shall be to only convey tone of voice when it has a significant impact on the conversation. Options shall also include: provide no tone of voice; and, provide all tone of voice.

The Bidder shall explain in detail the plan to meet this specification.

3.4.9.5.2 Background Noise

Must Provide. Operators shall, to the best of their abilities, let the text based telephone device user know the background noises that occur on the voice user's end if they have any bearing on the content, context or intent of the conversation or are proving to be an obstacle to clear accurate communication for either party or the Operator. For example, the Operator may type in parentheses that the dog is barking, the television is loud or the children are yelling. Nevertheless, a user may choose to have all background noise conveyed, or no background noise conveyed through use of the consumer preference database.

Phrases such as "sounds like" or "sounds" shall not be used unless requested. The Operator shall not provide opinion but shall provide observation of the situation. Examples of such observations include but are not limited to, (CRYING), (LAUGHING), (KIDS SHOUTING), (LOUD MUSIC), (DOG BARKING), (DOORBELL). Such descriptions of the observations of background noise may be used when they alter the course of a conversation or have an impact on the Operator's or either party's ability to communicate clearly. Consumer input has also indicated that — regardless of the customer profile — if the background noise is having an effect on the Operator's or either party's ability to clearly communicate, then it is important to provide this information to the parties.

The Bidder will provide an entry that can contain at least three choices in the consumer profile database addressing this issue and the default shall be to only convey background noise when it has a significant impact on the conversation. Options shall also include: convey no background noise; and, convey all background noise.

The Bidder shall explain in detail the plan to meet this specification.

3.4.9.6 Another Person On Line

Must Provide. Operators shall indicate to either party if another person comes on the other end of the line at any time during a relay call. Examples of such instances include but are not limited to: transfers to different departments, a supervisor/manager at a place of business taking over a call, etc.

The Bidder shall explain in detail the plan to meet this specification.

3.4.9.7 Redialing Busy

Must Provide. When a line is busy, the Operator shall redial at least three times, with a fifteen (15) second delay between abandoning a caller's attempt after encountering a busy signal and redialing if requested by the caller. In the event of continual busy signals, the Operator will continue to redial (using 15-second intervals) for as many attempts as requested by the caller. The text based telephone device user must remain on line.

The Bidder shall explain in detail the plan to meet this specification.

3.4.9.8 All Comments Typed

Must Provide. All comments directed to the voice user by the Operator shall be relayed to the text telephone device user. These comments shall be typed in parentheses, for example: (Will you accept a collect call?). All comments directed to the Operator by the voice user shall also be relayed, for example: (Yes, I'll accept the collect call.).

The Bidder shall explain in detail the plan to meet this specification.

3.4.9.8.1 Special Circumstances

Value-Added. On occasions where the voice user may be having difficulty understanding the Operator and the text telephone device user may be aware — or may recognize the fact — that the voice user may be hard-of-hearing or have a disability that affects speech or cognition, the text user may wish to comment to the Operator in an effort to inform and facilitate the call in an effort to achieve communication. The Operator should not relay such comments without confirming that the comments are directed to the Operator to facilitate the call.

The Bidder shall provide a detailed description of the Bidder's ability to abide by the desired conditions described in this item.

3.4.9.9 Use of Third Person

Must Provide. If either party communicates in the third person, the Operator shall relay in the third person.

The Bidder shall describe in detail the plan to meet this specification.

3.4.9.10 Corrections

Value-Added. To correct a typing error, Operators shall not backspace, but continue in a forward direction by typing "xx" (common TTY convention for error) and then typing the word correctly.

If automatic spelling-correction software is employed it must maintain a minimum of ninety-five percent (95%) accuracy, the Bidder will outline in detail protocol and specifications for use of such software.

The Bidder shall describe in detail the plan to meet this specification.

3.4.9.11 Verifying Spelling

Value-Added. When necessary, Operators shall verify spelling of proper nouns, numbers, and addresses that are spoken. ~~This shall be treated as a comment and relayed to the text-based telephone device user in parentheses. Examples include but~~

~~are not limited to: an Operator asking the voice user "(IS THAT NAME S M I T H Q Q GA)"; or the Operator informing the text user of the Operator's attempt to clarify with the other party "(ASKING SPELLING OF STREET NAME)".~~ If the operator requests spelling of a word, the operator shall type the word with spaces between each letter to indicate to the text telephone user that the spelling was requested. For example: K U M A R.

The Bidder shall describe in detail the plan to meet its specification.

3.4.9.12 Relay Operators on Line

Must Provide. The Operator shall stay on the line until both parties have terminated the call. If necessary to process a formal complaint or compliment, the call shall be transferred to an on-site supervisor or manager.

The Bidder shall describe in detail the plan to meet this specification.

3.4.9.13 Relay Operator Intrusion

Must Provide. Operators, supervisors or managers shall not counsel, advise, or interject personal opinions, messages, observations, personal questions or additional information into any relay call. Operators, supervisors and managers shall not hold personal conversations with consumers calling the DPRS on a relay call, or related to a relay call even when prompted by callers. Operators, supervisors or managers may not alter the substance or purpose of the communication in any substantive way, provided, however, that this shall not be construed so as to preclude Operators from asking questions that facilitate the progress of a relay call. (See Section 3.3.11.2).

The Bidder shall describe in detail the plan to meet this specification.

3.4.9.14 Name Not Required

Value-Added. DPRS users shall not be required to give their names or the name of the party they are calling. This information shall not be recorded in any form without the permission and knowledge of the caller (except for long distance billing purposes). It is understood that for some calls, having the full name would help facilitate the call. However, the Operator shall not refuse to make a call if the caller does not wish to give his or her name.

The Bidder shall describe in detail the plan to meet this specification.

3.4.9.15 "s" to Indicate Speech Disability

Value-Added. Operators will uniformly recognize an "s" typed by a text based telephone device user at the beginning of a call to indicate that the user has a disability affecting speech. The Bidders shall

~~propose procedures for fulfilling this requirement. This convention shall be included in all informational material produced and distributed to explain relay usage. The Bidder shall include an entry in the consumer preference database for this selection.~~

The Bidder shall describe in detail the plan to meet this specification.

3.4.9.16 Answering Machines

3.4.9.16.1 Capturing Announcements/Messages

Value-Added. The Operator shall have the capability to capture in electronic format and play back to the Operator for relaying the answering machine announcements and messages to prevent the need for repeated and timely redials. The captured announcements or messages may be retained on electronic media only for the duration on the call.

The Bidder shall describe in detail the plan to meet this specification.

3.4.9.16.2 Leaving Messages

Must Provide. Operators shall leave messages on answering machines or other voice processing systems including pagers and any voice driven menu systems if the user activates one while actually making the call. The DPRS user must remain on line. Bidders shall propose procedures for fulfilling this requirement, and the procedures shall include the following steps:

1. The Operator shall inform the caller when an answering machine has been reached.
2. The Operator shall relay any outgoing message on answering machines accessed to the caller (both voice and text) unless requested not to do so.
3. The Operator shall ask the caller if she/he wishes to leave a message.
4. The Operator shall leave the caller's message, either by voice or by text.
5. The Operator shall confirm to the caller that the message has been left.
6. The caller shall be charged only for one call, regardless of the number of redials required to leave the message.

The Bidder shall describe in detail how he shall meet this specification.

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3.4.9.16.3 Retrieving Messages

Must Provide. Operators shall retrieve messages from answering machines, voice-processing, voice-response systems, or state-of-the-art paging systems and relay a text message to a voice user or a voice message to a text user. Bidders shall provide protocol specifications for handling this requirement, and the procedures shall include methods for obtaining the necessary system access codes from the user and detailed statements regarding the confidentiality of that information.

The Bidder shall describe in detail the plan to meet this specification.

3.4.9.17 Operator Changeover

Must Provide. The Operator who receives a call shall ~~continue relaying a call until both parties have terminated their interaction~~ must stay with that call for at least ten minutes before an in-call operator change can take place. If an change of operators is necessary, both parties shall be informed. Exceptions to this requirement are:

- ~~Shift changes (including scheduled meals and breaks)~~
- ~~Call duration in excess of one hour,~~
- ~~Perceived conflict of interest (Operator identifies the customer as friend, relative or family member),~~
- ~~Illness or injury,~~
- ~~DPRS system failure / natural or other disaster~~

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The Bidder is required to provide a detailed outline of a plan to minimize Operator changeover during the middle of a call.

3.4.10 Handling of Obscenity Directed to the Operator

Value-Added. Operators ~~do not have to tolerate obscenity directed at them.~~ Bidders shall have a plan to ensure that the following requirements are met:

1. Operators shall not make a value judgment on the profanity, obscenity or legality of any message.
2. Obscenity included in the conversation between the two parties, even if it is referring to an operator, shall not be construed as obscenity directed at the operator.
3. Escalation procedures for obscenity/abuse shall be in place.

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It is acceptable to transfer callers using obscenities directed toward the operator to a supervisor.

The Bidder shall describe in detail the plan to handle these situations.

3.4.11 Relay Operator (Operator) Identification

Mandatory. Operators shall inform the text telephone device user and voice user of their identity by providing an Operator identification number. At the beginning of a call, text users shall see "MASS RELAY" before the operator identification number and voice users shall hear "Massachusetts Relay" or "Massachusetts Relay Service". At the end of a call — as part of sign-off procedure — only the identification number is necessary. See Sections 3.4.11.1 and 3.4.11.2 for additional requirements for identification. See also Section 3.4.11 regarding answering machines and Operator identification.

The Bidder shall specify a method that will allow identification of the Operator in the event a complaint or commendation is filed.

3.4.11.1 Inform User of Gender

Must Provide. Operators shall inform the text telephone device user and voice user of their gender by appending an "M" or "F," to the Operator identification number. Text users shall be informed via text (e.g. "Operator MASS RELAY OPR 1234M") and voice users shall be informed via voice (e.g. "Operator number 1234M"). At the beginning of a call, text users shall see "MASS RELAY" before the operator identification number and voice users shall hear "Massachusetts Relay" or "Massachusetts Relay Service". At the end of a call — as part of sign-off procedure — only the identification number including gender designation and trainee status — if applicable — need be given. See 3.4.11 regarding answering machines and Operator identification.

The Bidder shall describe in detail the plan for meeting this specification.

3.4.11.2 Inform User of Trainee Status

Must Provide. Operators with 90 days or less of employment as an Operator at the relay center — or who are in a designated "trainees" or are in a training program — shall be required to append the Operator identification number and letter indicating gender with the letter "T" signifying "Trainee" (e.g. "MASS RELAY OPR 1234MT") to text users and announce trainee status with the word "trainee" to the voice users (e.g. "Massachusetts Relay Operator Trainee number 1234M").

The Bidder shall describe in detail the plan for meeting this specification.

3.4.12 Caller-Provided Information

Value-Added. A Bidder may require that a caller provide NPA/NXX-type information to identify the caller's local calling area if that information is necessary to distinguish local calls from toll calls and to allow for faster call set-up times. The Bidder *must specify how such information would result in faster call set-up times and provide justification that no other equipment is available that would avoid the necessity for callers to provide their phone numbers.*

The Bidder shall describe in detail the plan for meeting this specification.

3.5 Administration / Control Specifications

3.5.1 Providing Qualified Staff

Mandatory. Employees of the Massachusetts DPRS shall be residents of the Commonwealth of Massachusetts. Preference in employment at the Massachusetts DPRS shall be given to persons with disabilities including individuals who are deaf, hard-of-hearing, late-deafened deafblind and/or have a disability affecting speech or clarity of speech. Each proposal shall include a detailed plan to ensure the active recruitment and hiring of skilled personnel. Emphasis shall also be given to recruiting and hiring individuals with American Sign Language (ASL) and relay service experience and with experience working within the deaf, hard of hearing, and/or deafblind communities as well as with individuals who have disabilities affecting speech or clarity of speech.

Each proposal must include: (a) an organization chart depicting levels and numbers of relay service personnel, (b) a hiring practices plan documenting outreach to the deaf and disabled community and copies of job descriptions for each planned position, (c) documentation of past hiring practices for relay service personnel, and (d) a description of proposed benefits, salary range, potential for advancement, etc. for OPRs and relay center personnel as well as documentation of these items in past practice as a relay service provider.

The Bidder shall describe in detail the plan to meet this specification.

3.5.2 Marketing / Outreach

Must Provide. The FCC and this RFP require that the DPRS provider develop an effective Marketing / Outreach plan to foster public awareness and provide information about the DPRS services in the community. The DPRS provider shall implement a Community and Business Marketing Program to educate all people about the relay service. The Bidder shall demonstrate how to initiate the proposed plan to maintain a continuing marketing and outreach program that includes an outline of the major points to be included in the program.

Marketing programs explaining how to use the relay service and providing general information shall include, but not be limited to:

- newspaper advertisements
- meetings with the user communities and potential user communities
- coordination with the Common Carrier distributing Specialized Customer Premises Equipment
- *distribution of informational pamphlets*
- utilization of computerized online bulletin boards
- the Internet
- bill inserts
- wallet cards
- billboards
- television
- radio, etc.

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These advertisements shall include, but not be limited to:

- description of relay service and purpose
- description of how to use the relay center
- description of the various services offered
- telephone numbers for the relay service – Text (Baudot/ASCII), Voice, etc.
- telephone numbers to call for further information, and
- the process for filing complaints or commendations

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The contract shall be branded by identifying the DPRS as the Massachusetts Relay Service.

The provider shall work with the Advisory Committee to see that all telephone directories carry appropriate information about the Massachusetts DPRS. The provider shall work with the Advisory Committee in the development of all marketing and outreach material to ensure that it is consistent with program goals.

The Bidder shall develop an educational program for DPRS users. This shall be accessible statewide, in a format easily understood by the user and updated as changes to the DPRS occurs. Please describe the program you will use for this purpose. Identify all staff positions associated with this activity.

The Bidder shall bid three options for this item. The first incorporates investing \$100,000 annually in the marketing plan, and the second option incorporates investing \$500,000 annually in the marketing plan. The third incorporates the Bidder's decided annual commitment to marketing.

The provider shall establish an independent advisory group, consisting of some representatives from the following groups, or other groups, to develop and monitor the implementation of the Marketing Plan:

ALDA Association of Late Deafened Adults

- BCIL Boston Center for Independent Living
- BSDSC Bay State Deaf Senior Citizen
- CHS Cooperative for Human Services, Inc.
- CORD Cape Organization for Rights of the Disabled
- DBCT DeafBlind Contact Center
- DEAF, Inc. D.E.A.F., Inc.
- ESSC Easter Seal Stroke Clubs
- MATP Massachusetts Assistive Technology Partnership
- MCB Massachusetts Commission for the Blind
- MCDHH Massachusetts Commission for the Deaf and Hard of Hearing
- MOD Massachusetts Office on Disability
- MRC Massachusetts Rehabilitation Commission
- MSAD Massachusetts State Association of the Deaf
- NEHD New England Home for the Deaf
- NILP Northeast Independent Living Program
- SHHH Self Help for the Hard of Hearing
- Stavros Stavros Center for Independent Living
- UCPA United Cerebral Palsy of Massachusetts
- WMAD/HI Western Massachusetts Association of the Deaf / Hearing Impaired

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Each bid shall demonstrate how the Bidder proposes to maintain a continuing Marketing Program and shall include an outline of the major points to be included in the program.

The Bidder shall describe in detail the plan to meet this specification.

3.5.2.1 Customer Service

Must Provide. The Bidder shall fully describe its Customer Service element including an 800 number for in-state access to customer service at the DPRS center. This description shall include at a minimum: staffing (include position descriptions) associated with this activity, specific activities designed to promote relay use, number of "person hours" per month and strategies for reaching hard-to-reach individuals such as people with a speech disability, hard-of-hearing people and elderly people.

The Bidder shall describe its reporting procedure and format for the activities of a customer service line and/or department. A sample report must be included in its response.

3.5.3 Billing for Long Distance Services (Carrier of Choice)

Must Provide. The Bidder shall describe the billing procedures that will be employed for intraLATA, intrastate/interLATA calls, interstate/interLATA calls, and international calls where appropriate, including rates to be charged to the user. The Bidder shall also supply billing or make the appropriate arrangements for interLATA long distance services to user's choice of interexchange carriers and at that carrier's rates

and using that carrier's calling card or other major credit card. Bidder must comply with residential billing and termination practices as specified under D.P.U.18448 (195.0) which is attached in Appendix 6. The Bidder shall include a complete description of how the service will be provided, and specify any billing limitations that may apply.

The Bidder shall provide the materials/documentation indicated in the description above.

3.5.4 Billing Arrangements

Must Provide. The Bidder must provide for charges for collect calls, person-to-person calls, calls to or from hotel rooms or hospital rooms, and calls charged to a third party. The Bidder must also provide for billing to any Massachusetts local exchange carrier or interexchange carrier calling card. The Bidder must include a complete description of how users will be billed for all calls. This description must include the Bidder's procedures for obtaining billing information from the local exchange companies, whether the billing will be performed in-house or contracted, specific credit cards to which calls can be billed, and a sample bill format.

The Bidder shall describe in detail the plan to meet this specification.

3.5.5 Call Billing Record

Value-Added. Bidders must specify a system for identifying and documenting long distance and toll calls for billing purposes. The system's record shall contain, at a minimum, the following information:

- a. telephone number or credit card number to be billed (NPA-prefix-line number)
- b. originating telephone number (NPA-prefix-line number)
- c. terminating telephone number (NPA-prefix-line number)
- d. date
- e. start time (the time the calling party is initially connected to the called party or to an answering machine at the called party's number or to a recorded message or intercept for the called number)
- f. end time (the time when either the called party or the calling party hangs up or the DPRS user asks the OPR to hang up, in the event that another call is to be placed)
- g. call time to the full second (the time in between start time and end time)
- h. indication by the DPRS provider that the call was processed through the Massachusetts relay for reporting/rating purposes
- i. all customer local calling plans will be recognized for billing

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The system must be automated as completely as possible, except in case of emergency calls, system failures, or other circumstances in which handwritten tickets are commonly utilized by voice telecommunication operators in automated offices under

standard practices. Bidders must also fully describe the billing system and billing process that will be used, including identification of any subcontractors, specific duties of the subcontractors, how the billing record detail will be transmitted to the billing agent (if any), and how charges will appear on the end user's bill.

The Bidder will provide the materials/documentation indicated in the description above.

3.5.6 Complaint Resolution

Must Provide. The DPRS must have a well-publicized complaint procedure instantly available to any DPRS user. This procedure should be printed in the local exchange carrier directories as well as presented in the Marketing Program by the DPRS. This material shall be available in alternate formats including, but not limited to: Braille, large print, electronic text on an Internet site and on computer diskette in both IBM and Mac formats, and audio tapes. Provider shall establish procedures regarding complaints, inquiries, and comments regarding DPRS services and personnel. The Bidder shall provide an outline of the major points to be included in the complaint, commendation, comment and inquiry procedures. The provider shall ensure that any caller to the Relay Center who has a complaint, comment or commendation will be able to reach an on-site supervisor or administrator while still on line during a relay call.

The DPRS shall provide an on-site supervisor-attended toll free hotline for the handling of complaints. Any caller to the Relay Center must be able to reach a supervisor or administrator with a complaint at all times. The level of access to such services shall be functionally equivalent to that of standard telephone service consumers.

All complaints received by supervisors verbally or through the text of a call or in writing shall be documented, including their resolution, or status if unresolved, and kept on file and available upon request to the Administrator, the DTE, and the Advisory Committee.

The Bidder shall describe in detail the plan to meet this specification.

3.5.7 Consumer Input

Value-Added. DPRS users — both text telephone device users and voice users — shall have input on the quality of the delivery of service. Bidders shall develop a plan to include the users of the system in any evaluation of the DPRS. An outline of this plan shall be included with the Bidder's proposal. The plan should explain methods for consumer input and how the recommendations from these evaluations will be incorporated into the policies of the Relay Center. The evaluations shall not come from those directly or indirectly involved in operating the Relay Center or its corporate associates.

This does not preclude the provider from conducting additional internal evaluations that use relay staff. The results of any evaluation shall be reported to the

Advisory Committee quarterly.

The Bidder shall describe in detail the plan to meet this specification.

3.5.8 Relay Operator Training

Must Provide. Each Bidder shall demonstrate how ongoing OPR training will be provided by including with its proposal a detailed outline of a proposed OPR training plan. The Bidder shall describe in detail a training program to be offered within the first 90 days of employment to establish proficiency, and at a minimum provide an 80-hour-per-OPR-per-year training program thereafter to maintain and improve skills. The Bidder shall indicate how much training time shall be dedicated before the trainee may handle live calls. Additional training — at no additional cost to the Commonwealth — may be required should the DPRS provider fail to meet standards of quality of service established in this RFP. Forty hours of this training would be dedicated to improving and enhancing basic OPR skills, such as spelling, typing, use of equipment, response time, and exercising judgment in unusual circumstances.

The provisions for OPR training shall include, but not be limited to, ASL "gloss" and grammar, spelling, typing (i.e., use of macros), dictation, stenography, deaf culture, needs of speech-disabled users, emergency call procedures, and operation of relay telecommunications equipment. Training shall include both simulated and live on-line call handling.

The Bidder shall describe in detail the plan to meet this specification.

3.5.8.1 Certification

Value-Added. The Bidder shall demonstrate an on-going process for certification of completion of its continuing education effort. Appropriate portions of in-service training for OPRs and supervisory personnel shall be provided by experts from the deaf, hard-of-hearing, speech-impaired, and deafblind communities in the field of language interpreting; ASL and deaf culture; and speech disabilities. Alternatively, the DPRS provider must demonstrate that such expertise exists on staff. The Bidder shall include in its training plan options for providing ongoing OPR training in the form of seminars, briefing sessions, etc., to inform and update OPRs on issues and topics pertinent to the DPRS users' communities, including state and national legislation and policy issues. The Bidder shall also indicate any incentives provided to those OPRs and/or personnel who achieve proficiency or excel at performance testing as well as live-call performance.

The Bidder shall provide the materials/documentation indicated in the description above.

3.5.8.2 Disability Awareness

Value-Added. All Relay Center staff, including management, shall receive training about ASL, deaf culture, acquired deafness, disabilities affecting speech, ethics, and confidentiality. Each Bidder's proposal must include an outline of a staff training plan indicating training topics and time-frames as well as identifying individuals or organizations representing the people who are deaf, hard of hearing, who have *disabilities affecting speech or clarity of speech, and people who are deafblind and their respective communities* that will be used to assist with the training.

The Bidder shall describe in detail the plan for meeting this specification.

3.5.9 Supervisor Training

Must provide. In addition to receiving training in all areas as outlined for OPRs, supervisors must complete a minimum of 25 hours annually in management training, including: general management, conflict resolution, employee motivation, etc.

The Bidder shall describe its plan for providing this training and how the Bidder will test to determine what supervisors meet or exceed operator qualifications.

3.5.10 Relay Operator Counseling

Value-Added. The Bidder shall outline a counseling and support program that will help OPRs deal with the emotional aspects of relaying calls. Because OPRs are not allowed to talk about their calls with other OPRs, friends, or family, other relay systems have found that operators need to have access to someone they can talk to and trust. They need to be able to talk about their emotions and learn ways to cope with their feelings. Those providing this staff support must have training in dealing with these situations. However, the OPRs must not give the names of the calls involved to the support person. The counseling support system must follow the confidentiality provisions listed above.

The Bidder shall provide the materials/documentation indicated in the description above.

3.5.10.1 Additional Counseling Services

Value-Added. Besides the above minimum requirements for OPR counseling, the Bidder shall indicate any additional counseling services needed or provided. These may include: 24-hours-per-day access to counseling for OPRs; counseling staff with professional degree(s) pertinent to the needs of relay OPRs; designation of a minimum of one (1) full-time staff person to organize and lead group discussions of common OPR experiences and emotions; and/or other counseling recommendations that the Bidder may wish to make.

The Bidder shall describe in detail the plan to meet this specification.

3.5.11 Staffing for Call Volume/Usage Patterns